

Agentforce in Action for Asset & Wealth Management

Operationalizing Agentic Intelligence Across
Advisory, Service, and Revenue Workflows

brillio





Asset and wealth management firms are operating in an environment shaped by acquisitions, evolving advisory models, and rising expectations for personalized, always-on client engagement. While these changes create new revenue opportunities, they also introduce significant complexity across the lead-to-revenue lifecycle.

In many organizations, sales, onboarding, servicing, and renewals are spread across multiple systems, business units, and Salesforce orgs. Processes are optimized locally but disconnected at an enterprise level. Advisors lack a unified view of households and client interactions, while leadership teams struggle with fragmented pipeline, forecasting, and revenue visibility. IT and operations teams are left managing duplicated data models, inconsistent governance, and parallel workflows.

As firms increasingly turn to AI to address these challenges, many discover that isolated AI capabilities are not enough. AI agents operating without unified data, standardized processes, and coordinated workflows quickly become siloed, limiting trust, adoption, and business impact.

This is where agentic orchestration becomes critical. Platforms such as Salesforce Agentforce enable firms to embed AI-driven agents directly into end-to-end advisory, service, and revenue workflows - but their effectiveness depends on a cohesive enterprise foundation. Without organizational alignment and lifecycle orchestration, even advanced agentic capabilities struggle to scale.

Brillio's Salesforce Framework for Asset & Wealth Management

Brillio's Salesforce framework establishes the enterprise operating foundation on which Agentforce-powered experiences are deployed across the asset and wealth management lifecycle. It enables firms to move from fragmented, function-led processes to a cohesive, lifecycle-driven operating model, ensuring that agentic capabilities operate with unified data, standardized workflows, and consistent governance.

Rather than optimizing individual stages in isolation, the framework aligns people, processes, data, and platforms across the full revenue journey, from initial lead engagement through onboarding, advisory execution, servicing, and renewals. This alignment ensures that Agentforce is embedded within governed workflows and trusted data models, rather than introduced as a disconnected AI layer.

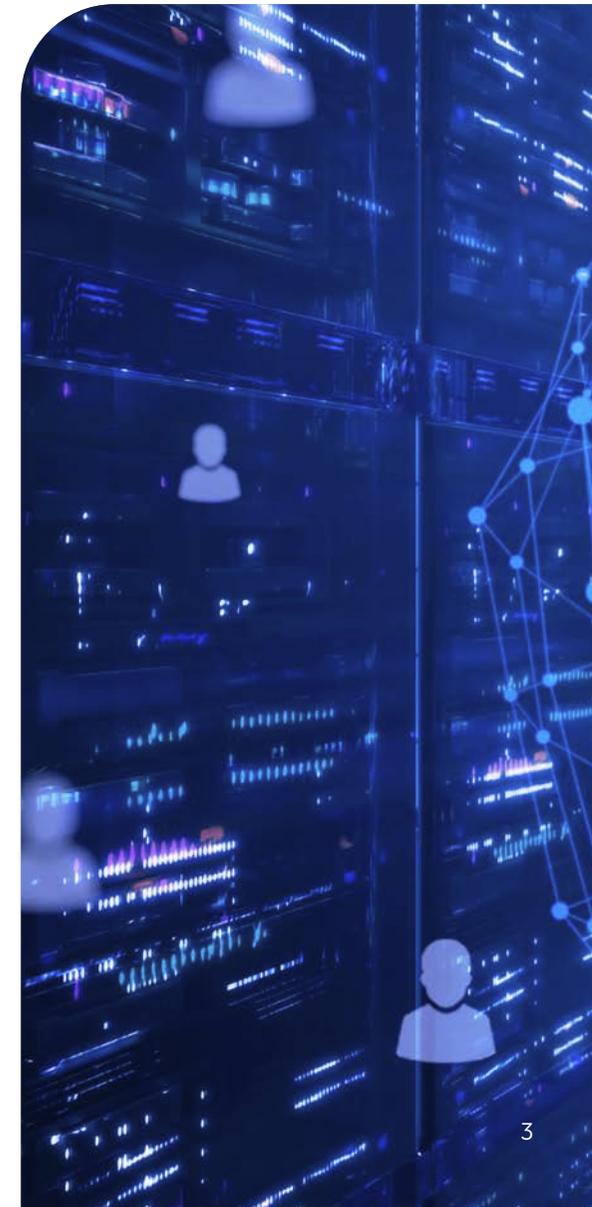
At its core, the framework provides the structure required to operationalize Agentforce at scale, while maintaining the regulatory rigor and flexibility required in asset and wealth management environments.

The framework is organized around interconnected lifecycle stages:

Acquire and Onboard: Sales & Marketing Transformation

This stage leverages Brillio's expertise in Marketing and Sales Transformation to drive high-fidelity client acquisition and seamless entry into the firm's ecosystem.

Marketing Transformation: Delivering personalized journeys through Journey Builder and Data Cloud for Marketing to drive loyalty and lead generation.



Sales Transformation: AI-powered sales insights and "Customer 360" views, supported by lead-to-opportunity pipeline management and territory optimization.

Experience Cloud: Migration to self-service portals and AI-led B2B/B2C digital experiences to simplify the initial client touchpoints.

Advise and Transact: Revenue & Commerce Modernization

Brillio streamlines the transition from "advice" to "execution" by modernizing the platforms where transactions and revenue are managed.

Revenue Transformation: Comprehensive Quote-to-Cash assessment, including automated billing, subscription management, and consumption-based revenue models.

Commerce and Content: Multi-channel optimization for B2B and B2C commerce, featuring content personalization and automated D2C business operations.

Industry Solutions: Specialized accelerators for Wealth and Finance, including Auto Finance Modernization and dedicated Digital Experience layers for complex financial products.

Serve and Renew: Intelligent Service & Agentic Orchestration

This stage represents the primary operational footprint of Agentforce within asset and wealth management. It is where agentic intelligence is embedded directly into day-to-day advisory and service workflows, driving faster resolution, greater consistency, and more personalized client interactions.

Agentforce & AI: Deploying autonomous AI agents for service and advisory support, powered by Salesforce Data Cloud. Agentforce enables real-time, context-aware interactions, intelligent case handling, proactive recommendations, and seamless escalation to human advisors when required.

Service Transformation: Implementing intelligent contact centers with omni-channel engagement, automated case management, SLA-based routing, and AI-assisted resolution.

Field Service & Mobile: Supporting specialized advisory roles with mobile-first experiences and AI-enabled insights for field-based interactions.

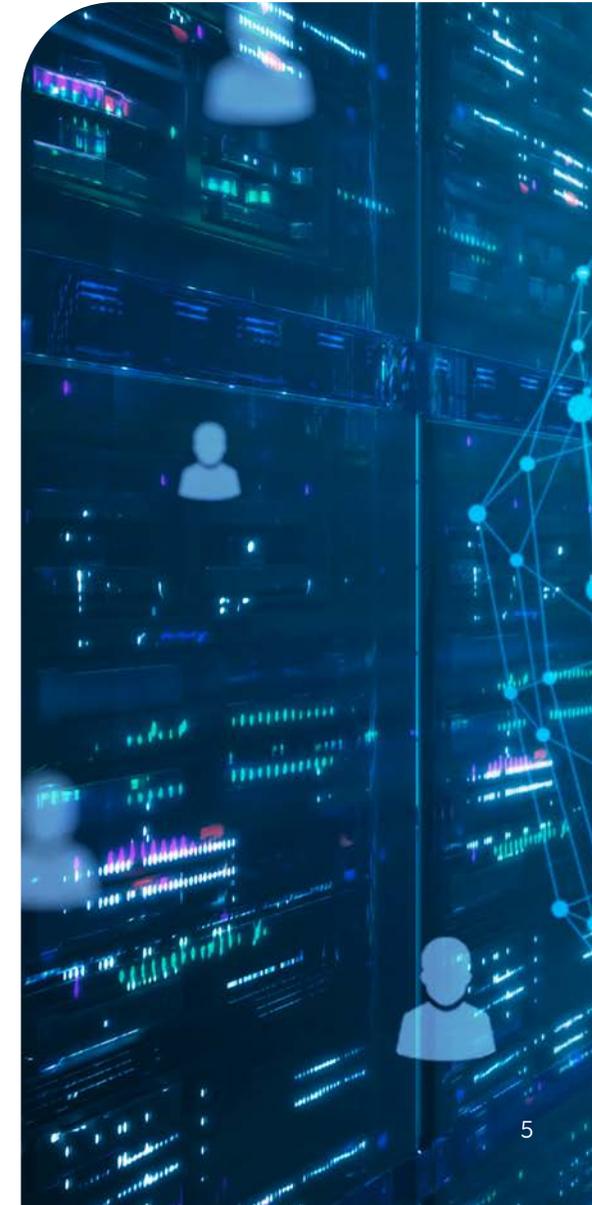
Optimize and Govern: Platform Engineering & Org Strategy

This stage ensures that Agentforce-enabled experiences remain scalable, secure, and governed over time. It provides the technical and operational backbone required to support continuous innovation without compromising compliance or stability.

Release Engineering: Establishing DevOps and CI/CD pipelines, source control, automated testing, and quality gates to support rapid, reliable deployment of Agentforce-enabled capabilities.

Org Remediation & Consolidation: Supporting M&A-driven org migrations, technical debt reduction, and large-scale process harmonization across Salesforce environments.

Product Development: Extending platform capabilities through custom AppExchange solutions, LWC frameworks, and API integrations that support agentic workflows.



Agentforce Use Cases in Asset & Wealth Management

Asset and wealth management firms face increasing pressure to deliver faster, more accurate, and more personalized client interactions across advisory, servicing, and operational touchpoints. Agentforce enables these outcomes by embedding agentic intelligence directly into day-to-day workflows, reducing dependency on manual effort and fragmented systems.

The following use cases illustrate how Agentforce is applied across the asset and wealth management lifecycle, based on real client implementations.

Advisor & Client Experience

Always-On Client Support and Inquiry Resolution – Agentforce enables autonomous service agents that provide 24x7 support for common client inquiries across digital and self-service channels. Routine requests are resolved automatically, while complex issues trigger seamless case creation and escalation to human advisors or service agents, preserving continuity and personalization.

Case Summarization and Faster Handoffs – Agentforce generates concise, context-rich summaries from emails, notes, chats, and call transcripts. These summaries support faster hand-offs between advisors, service agents, and managers, ensuring continuity across interactions.

Relationship 360 Insight and Advisor Preparedness – By leveraging Salesforce Data Cloud, Agentforce builds unified client and household profiles that surface holdings, interaction history, sentiment, and risk insights. Advisors enter conversations with full context, enabling more relevant and personalized engagement.

Advisor Assist and Next-Step Guidance – Embedded directly into advisor workflows, Agentforce provides real-time guidance on next best actions, compliance disclosures, and service or investment-related steps. This support enhances advisor confidence without disrupting live interactions.

Client Communication Composition – Agentforce drafts personalized, compliant client communications using CRM context and regulatory guidance. Advisors and service teams can respond faster while maintaining tone, accuracy, and compliance.

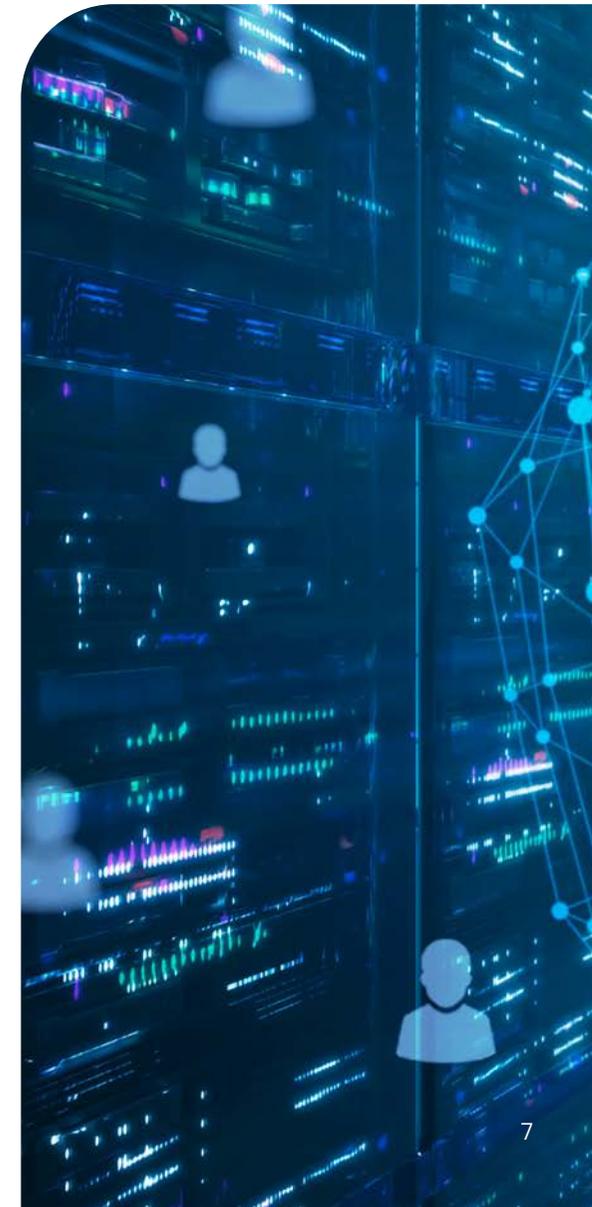
Operational Efficiency

Faster Access to Client and Case Information – Agentforce enables intelligent search, summarization, and retrieval of client, household, and case data using names, identifiers, or contextual cues. Users spend less time navigating systems and more time engaging clients.

Unified Agent and Advisor Workspace – Agentforce assembles relevant client, product, and case information into a single adaptive workspace. Embedded guidance and contextual automation eliminate screen switching and reduce cognitive load across advisory and service workflows.

Proactive Case Creation and Early Intervention – By monitoring client data for anomalies, service triggers, or risk signals, Agentforce automatically creates cases before issues escalate. This shifts service models from reactive to proactive.

Automated Updates and Data Consistency – Support automated verification and updates of client contact details and case information, logging changes in real time. This reduces manual effort and prevents data inconsistencies.



Data Hygiene and Enrichment – Agentforce continuously validates and enriches client data using Data Cloud and external KYC sources, improving trust in client records and reducing manual cleanup.

Cross-System Case Orchestration – Agentforce automates routing and synchronization between Salesforce and ServiceNow, enabling unified case visibility and traceability across platforms.

Risk & Compliance Intelligence

Policy and Compliance Answer Bot – Using retrieval-augmented generation over approved compliance manuals, Agentforce answers advisor and service queries with cited references. This supports faster decision-making while improving audit readiness.

Intelligent Client and Case Identification – When clients provide partial or inconsistent identifiers, Agentforce uses metadata, interaction history, and contextual signals to identify the most likely client or case. Confidence-based recommendations guide users to the correct records quickly.

Next Best Action Recommendations – By combining client behavior, transaction history, and service interactions, Agentforce recommends proactive service actions or compliant cross-sell opportunities.

Brillio AI-Led Accelerators That Fast-Track Agentforce Adoption

Brillio's AI-led accelerators reduce the time, complexity, and risk required to operationalize Agentforce at scale. They ensure data readiness, standardized execution, and governed deployment, allowing firms to move from Agentforce pilots to enterprise-wide agentic experiences.

Rather than starting from scratch, organizations' leverage proven assets that accelerate org consolidation, data alignment, execution consistency, and Agentforce adoption.

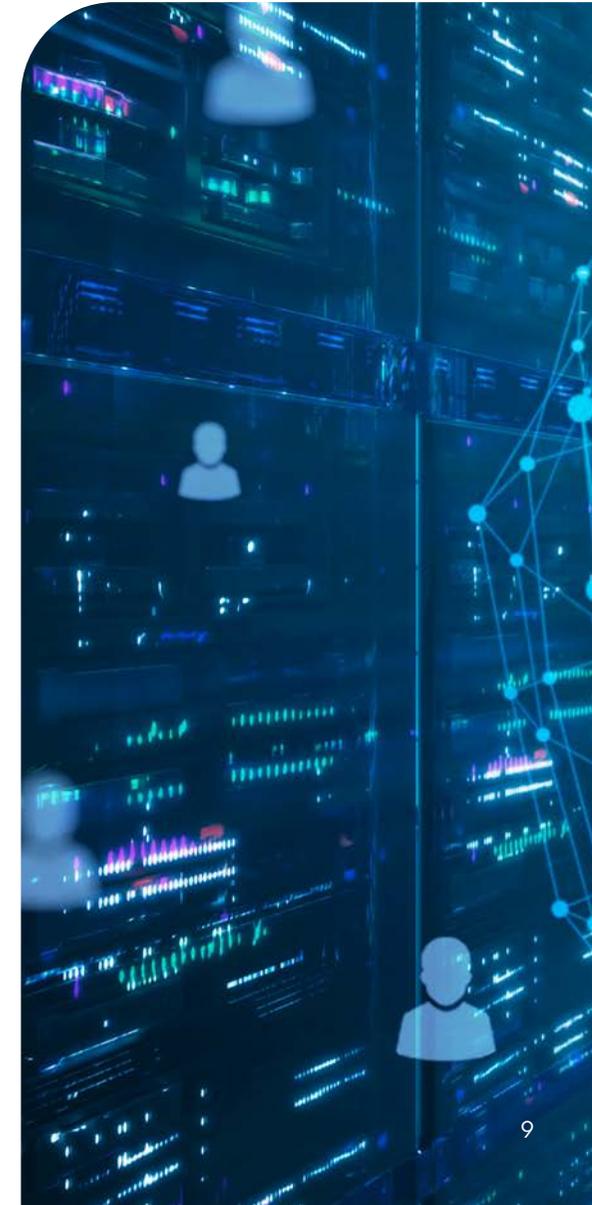
Readiness and Prioritization – The AI Assessment Maturity Model and Skill Gap Detector assess organizational readiness for agentic adoption, identify capability gaps, and align Agentforce rollout with business and adoption needs.

Data and Org Consolidation – Accelerators such as the Talend Data Migration Accelerator and Reusable Artifacts establish a trusted, governed data foundation required for Agentforce to operate with enterprise context.

Standardized Execution Frameworks – Pre-defined templates, business scenarios, and the Quick Start Solution provide repeatable patterns across service, renewals, and revenue workflows, ensuring Agentforce operates within consistent execution models.

Sales, Order, and Renewal Optimization – Accelerators including the Product & Pricing Catalog Template and Loader, Order Flow Configurator, and Renewal Manager support accurate, automated downstream execution aligned with Agentforce-driven interactions.

Quality, Governance, and DevOps – Force Clinic and the DevOps Accelerator standardize quality, release management, and governance, supporting reliable delivery of Agentforce-enabled capabilities.



Real-World Results

Unifying AI Across Fragmented Enterprise Platforms

The Challenge

A global financial services organization operated Salesforce and ServiceNow as parallel enterprise platforms, each with native AI capabilities. However, the lack of a unified orchestration framework led to siloed AI workflows, duplicated capabilities, inconsistent user experiences, and no single source of truth for advisors and service teams.

The Solution

Brillio implemented an AI-driven orchestration strategy that unified workflows, data, and experiences across platforms. Salesforce Agentforce was positioned as the primary orchestration and interaction layer, supported by centralized data visibility and standardized AI workflows spanning Salesforce, ServiceNow, and Data Cloud.

The Impact

The organization achieved consistent, cross-platform agentic workflows, faster decision-making, and a unified advisor experience with Salesforce as the single glass for orchestration. The new foundation enabled scalable, federated AI adoption across enterprise models, including Agentforce and other native AI services.



Enabling Agentic Client Service in Wealth Management

The Challenge

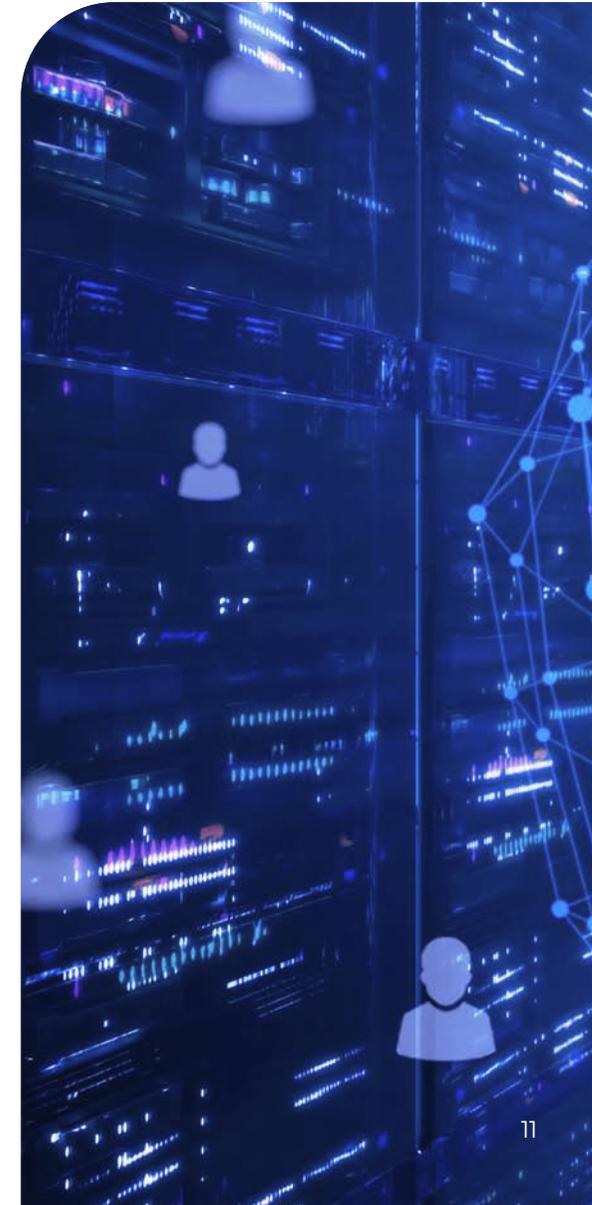
A renowned wealth management firm struggled with delayed client responses and heavy reliance on live agents. Existing chatbot capabilities were limited, FAQs were not integrated, and routine service tasks such as case updates and contact management caused bottlenecks and inconsistent client experiences.

The Solution

Brillio partnered with the firm to implement Salesforce Agentforce, deploying a tailored autonomous service agent to handle FAQs, case status updates, and client data management. The solution was integrated across Omni-Channel and Embedded Service, enabling real-time, AI-driven interactions with seamless escalation to human agents when required.

The Impact

Inquiry accuracy improved from 0% to over 80%, live agent workload was reduced by approximately 20%, and clients received instant responses for routine requests. The firm established a scalable agentic service model that improved efficiency while maintaining personalized client engagement.



ABOUT BRILLIO

Brillio is a digital technology services company that drives AI-first engineering and design-led experiences for global enterprises. Born digital in 2014, its consulting-led services span Customer Experience, Data & AI, Product Engineering, and Digital Infrastructure. With an industry-leading NPS of 71, Brillio accelerates time to market through its proprietary BrillioOne.ai platform, powered by AI-ready talent with deep domain expertise. Brillio is the official Digital Transformation Partner and the official Data and AI Services Provider of Atlassian Williams Racing. Brillio partners with leading technology providers including Microsoft, AWS, Google Cloud, Salesforce, Adobe, Databricks, and Snowflake and operates with 6,000+ “Brillians” across 15 global delivery centers. Consistently recognized as a Great Place to Work® since 2021, Brillio blends innovation, talent, and purpose to deliver measurable outcomes for clients and fulfilling careers for employees.



<https://www.brillio.com/>

Contact Us: info@brillio.com

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